Solicitation Management

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Agenda

- **Purpose**
- **Why CORE?**
- **What's new?**
- **Policy & Procedure Overview**
- **System Demo**
- **Question & Answer**

Purpose

This session provides an overview of the key Solicitation features of the Colorado Operations Resource Engine (CORE).

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Why CORE?
Procurement Overview
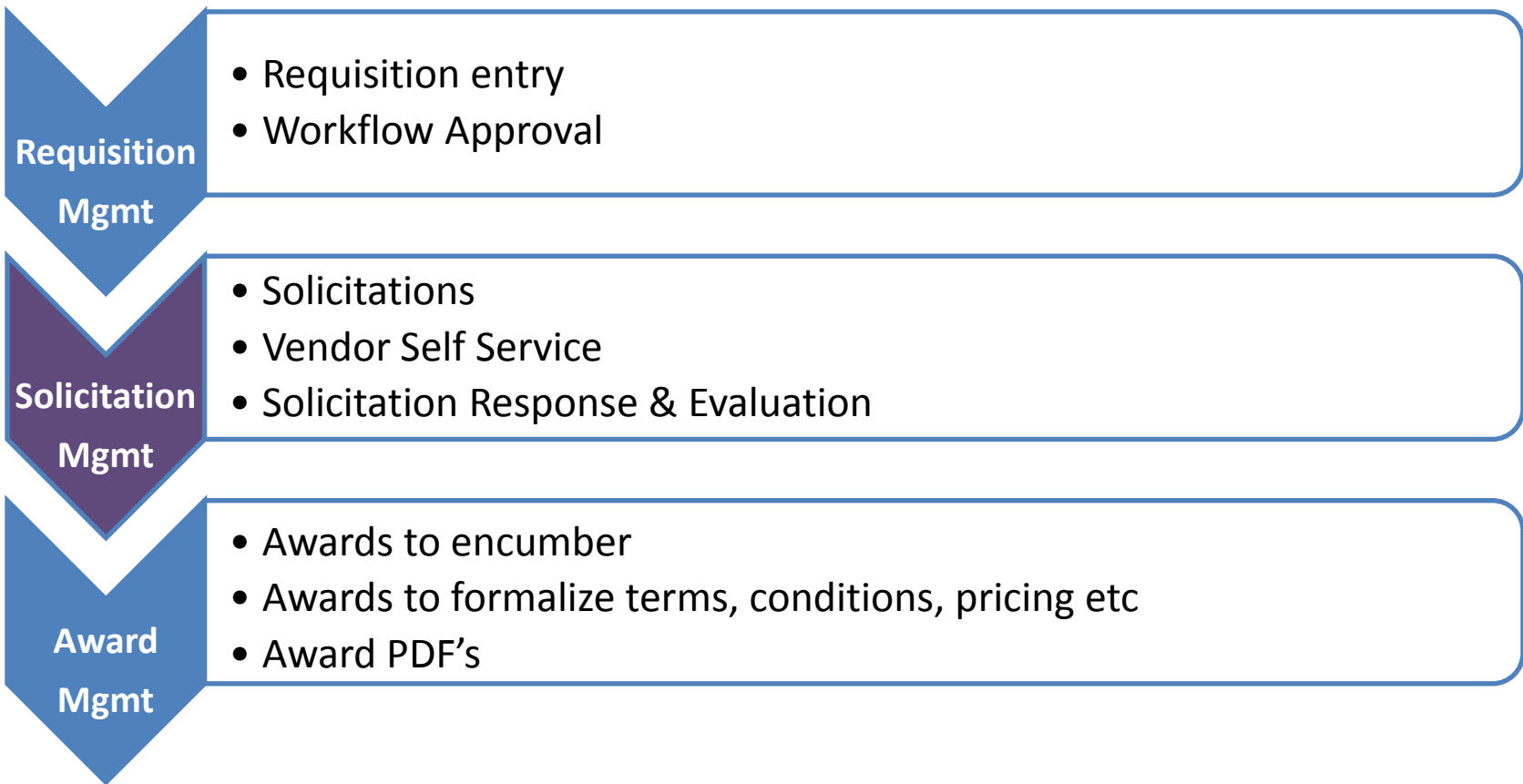
Requisition Mgmt
- Requisition entry
- Workflow Approval

Solicitation Mgmt
- Solicitations
- Vendor Self Service
- Solicitation Response & Evaluation

Award Mgmt
- Awards to encumber
- Awards to formalize terms, conditions, pricing etc
- Award PDF's

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Why CORE?

- **Currently the State has multiple mechanisms and systems for managing the procurement lifecycle (Paper Processes, COMPASS, BIDS, COFRS etc.).**

- **This has resulted in inconsistent business practices.**

- **CORE provides a single system for end-to-end procurement management – including Requisitions.**

What's New?

Document Code	Document Name	Business Purpose
DQ1	Documented Quote	Solicitations for goods/services less than $150,000
IFB1	Invitation for Bids	Solicitations for goods/services greater than $150,000
RFI	Request for Information	Request for information that does not result in an Award
RFP	Request for Proposal	Solicitations for goods/services greater than $150,000
NPSS1	Notice of Proposed Sole Source	Notification to vendor community of a proposed Sole Source
RFQ	Request of Quotes	Request quotes from Vendor Lists
NCS1	Notice of Contractor Settlement	Notification of Construction Project completion
RFQ1	Request for Qualifications	Solicitations for construction vendors to evaluate
BAFO	Best and Final Offer	Used to solicit best and final pricing during final vendor selection
SR	Solicitation Response	Entry of vendor responses to solicitations
EV	Evaluation	Used to gather and evaluate solicitation responses

What's New?

- CORE is the single system for Procurement – including Solicitation Management.

- Procurement Management Queue for Department Procurement Offices to manage Requisition to Solicitation to Award.

- Standardized usage of industry standard commodity structure – NIGP Commodity Code.

- Ability to record Solicitation Responses and Evaluations in a system.

- Additional functionality for Vendors in the Vendor Self Service module (VSS) e.g. Vendors submitting responses electronically through VSS.

- No Registration Fee for Vendors registering in VSS.

- Commodity Code driven email notifications to Vendors.

- Procurement Folder to capture documents from Requisition to Payment.

Policy & Procedure Overview

Solicitations P&P

- Solicitations require a preceding requisition
- CORE allows you to select Solicitation methodology relative to Colorado Procurement Code & Rules
- Online Vendor responses preferred
- Solicitations will be conducted at 5 digit commodity code (Inventory at 11 digit)
- All solicitations require a Solicitation Response and Evaluation in CORE prior to Award

System Demo

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Demonstration Items

- **Documented Quote (DQ1)**
  - **Copy forward from RQS**
  - **2 Commodity Line – Goods & Services**
  - **Evaluation Criteria**
  - **Publish Document Quote**
  - **Attach supporting documents**
- **Solicitation Response (SR)**
  - **Commodity Line**
  - **Evaluation Criteria**
- **Evaluation (EV)**
  - **Award to Purchase Order**
  - **Bid Tabulation**
  - **Award by Line vs. Total**
  - **Evaluator comments**

Review

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Key Takeaways

- CORE provides an integrated system for the Procurement Lifecycle along with the Accounting and Budget functional areas
- Vendor Online responses available
- Recording Solicitation Responses and Evaluations
- Commodity code driven email notifications to Vendors
- No fee for Vendor registration
- Procurement Management Queue & Procurement Folder

QUESTIONS

A Few Reminders

- **Test Drive CORE – Room 602**

- **Training Starts in April**
  - Registration instructions emailed to all
  - Register promptly for best selection of times and locations
  - Send questions to: *core.training@state.co.us*

- **At end of conference, fill out the CORE Conference evaluation**
  - In your packet or at Registration Table
  - Turn it in at your last session or leave at Registration Table

Stay in Touch with CORE

- Read your emails from CORE.news & CORE.training

- Send questions or comments to CORE.news@state.co.us

- Request access to CORE Project website
  by sending email to CORE.news@state.co.us

- Talk to your department leaders and CORE functional experts

- Share what you know with others on your teams

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Thank You